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ABSTRACT

This document offers instructions to trainers on the use of more than 100 learning aids, learning activities, and evaluation techniques that are helpful in working with trainees. The strategies described will be useful not only in trainer/trainee situations (which imply active participation on the part of the trainee) but also in teacher/student interactions. The items are divided into six categories: instructional methods, group techniques, simulation techniques, practical experiences, audiovisual support systems, and evaluative activities. Instructions for using the items vary in length from a paragraph (for items with which most trainers are familiar) to several pages (for less familiar items). (GW)

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METHODOLOGIES FOR TRAINERS:

A Compendium of Learning Strategies

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1977

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FOREWORD

Ten years experience as a trainer, training designer, training director, and trainer of trainers made me aware that no one had ever drawn together in one convenient place a concise listing of the dozens of learning activities which are the trainer's stock in trade. I first had the urge to compile such a list in 1971, calling it A Checklist of One Hundred and One Training Techniques, but at that time I was unable to conceive a logical means of organizing these activities into significant categories. Malcolm Knowles provided insights along these lines in his The Modern Practice of Adult Education, but in his work he listed only the better known training activities.

By the time Ellen Ax was available to work on the project as an intern, I had a much better idea how the various exercises should be categorized and sequenced. This conceptualization plus Ellen Ax's research and writing skills produced the present volume.

This compendium assumes a basic difference between "training" and "teaching" approaches (with the implied involvement of participants in a training mode as opposed to the heavy use of presentation techniques associated with teaching). The general trend in education, however, is for the more adventurous teachers to take on

more and more of the techniques originally developed by trainers. This can only be considered a healthy movement and one which will surely improve the quality of education. Teachers are most welcome to steal as many of the exercises and approaches as they want and to adapt them freely.

A word should be addressed to the uneven coverage of the various techniques, activities, and methodologies included in this compendium. This unevenness results from the belief that there is no need to overexplain the obvious. Less familiar techniques, on the other hand, need to be explained in sufficient detail to make it possible for you to apply them.

If this compilation of learning activities is of use to trainers and educators, Ellen Ax and I will be rewarded for our efforts.

1977

Robert Kohls
Washington, D. C.

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INSTRUCTIONAL METHODS

TEACHING MACHINES

Any kind of device that presents instructional material. It may be a simple device, or it may be electronic; it may present the information visually or audio-visually.

Essential Characteristics:

1) Sequential presentation of material;

2) Provision for response on the part of the trainee;

3) Immediate feedback to the student informing him/her of the quality of the response.

Advantages of the Machine:

1) Programs can be linear or multiple choice or a combination of both.

2) Displays of charts or pictures plus the use of color can be presented by some machines.

3) Programs in machines can be used over and over again by different trainees without wearing out, thus the cost per trainee of materials is reduced.

Programmed Instruction (PI)

1) Material to be learned is prepared so that it can be presented to the learner in a series of carefully planned sequential steps.

2) Steps progress from simple to more complex levels of instruction.

3) At each step, the student must make a response that tests his/her comprehension.

4) Learning takes place at the student's own pace.

5) If the response is correct, he/her immediately receives information indicating this and can then proceed to the next step. If not correct, he/she is instructed to restudy the material and choose or construct another response, or is told why the response was wrong.

Programmed instruction is an application of certain behavioral laws or principles thought to modify or change behavior, including verbal behavior. Programmed instruction provides immediate reinforcement for correct responses.

Effects of Programmed Instruction on Three Important Roles in Training:

1) Role of Trainer - He/she becomes a resource and environmental manager rather than a delivery system for subject matter.

2) Role of Trainee - The trainee is active in interacting with the material instead of passive. Distinction is made between what was presented and what was learned. If there is a discrepancy between the two, it will show up quickly and dramatically.

3) Role of Developer - In development of Programmed Instruction, the instruction is tried out on a trainee (for validation and revision). The first materials given the trainee for try-out should be less than you estimate that he/she needs.

- If materials are insufficient, the trainee can be used as a source of information on what needs to be added.

When To Use Programmed Instruction: Need to Consider -

1) Administrative costs;

2) Probable benefits (which would be derived from the improved performance of employees upon completion of the program);

3) Number and rate of trainees over a continued period of time.

Means of Obtaining a Programmed Instruction Unit:

1) Can buy off-the-shelf program from a publisher if one exists that meets your needs.

2) Can hire a contractor to develop the program exclusively for you.

3) Can train own personnel in the programming process and develop the program internally.

4) Can combine the last two options, i.e., hire a consultant to develop the program while concurrently training some of your personnel

in some phases of programming.

Best Results:

When Programmed Instruction is viewed as a process which includes an analysis stage prior to specifying objectives and developing the program itself and a maintenance stage which concerns itself with the support system to increase the likelihood that the trained behaviors will continue.*

▷ Computer Managed Instruction (CMI) and
▷ Computer Assisted Instruction (CAI)

Method of automating the teaching-learning process. Instructional content is presented by a computer connected to terminal devices that lead the learner through the course content and perform an evaluation of his/her level of achievement.

CMI and CAI are the result of combining technologies including "programmed instruction;" "audio-visual" techniques; "data processing," which provides computational speed, storage capability, and time sharing capability; and "data communications," which allows the centralized computer installations to serve widely scattered points.

Advantages:

1) Individualized instruction
2) Reduced training time
3) Standardized training

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* Source: Training and Development Handbook (Second edition) Robert Craig (Editor), New York: McGraw-Hill, 1976, Ch. 39. Bibliography on pgs. 39-22 and 39-23.

4) Quick updating of courses from a central location.
5) Better training evaluation.

In an individualized instruction system each trainee should be able to:

1) Work at his or her own pace.
2) Begin and end the lesson when convenient.
3) Begin at a point appropriate to his/her past achievements.
4) Pursue his/her interest options or tailor instruction to a particular application.

Ways Trainee Interacts with the Computer:

1) Problem solving
2) Data reduction
3) Simulation
4) Testing
5) Drill
6) Practice
7) Tutorial
8) Inquiry

Essential Elements in a CMI or CAI System:

1) Central processing unit (CPU).
2) Storage (or memory).
3) Terminal(s).
4) Communications.

Preparing Computer Managed Instruction (CMI) and Computer Assisted Instruction (CAI) Programs

1) Programs take much more time to develop than conventional training materials.
2) Estimated number of hours to develop one hour of instruction range from 10 to 444. Sensible average is 100 development hours per hour of finished instruction.
   - Depends on: complexity of the subject matter; mode of interaction (drill or practice vs.

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*Source: Training and Development Handbook (Second Edition) Robert Craig (Editor), New York: McGraw-Hill, 1976, Ch. 41 Bibliography on pgs.41-19.

tutorial); complexity of displays; and the number of branches.

3) Development:
   (a) Specification of training objectives.
   (b) Task analysis - Need to tell computer in detail:
      (1) all aspects of the task to be mastered by trainee,
      (2) differences to be expected among trainees, and
      (3) how to sequence its instructions to the trainee.

LEARNING ACTIVITY PACKAGE (LAP)

1) Consists of directions and range of activities which the learner undertakes privately.

2) Every instructional package has a booklet which gives directions; states what materials are to be used; and which activity to do first.

3) Sequence of activities:

   (a) Passive exercises - read, listen, watch.
   (b) Active exercises - experiment, produce, group activities.
   (c) Synthesis - summarize, report, answer.
   (d) Self-test - which the student may take prior to any of the activities, as a pre-test, if he feels he already knows the material.

4) Contains both required and optional activities.

5) Has objectives (goal of the package)
   - states what you will be able to do after you finish the learning activity package.
   - usually on page 1 or page 2.

6) Tests:
   Can be printed, spoken, or ask you to make something.

Will take a test for each LAP objective.
Take both pre and post tests.

- Self-test: take only for yourself and intended for learner to check test him/herself. Comes before the post-test, and shows if you know enough to take the post-test.

INFORMATION – COLLECTING ASSIGNMENTS

Combining all forms of learning methods such as: interviews, research, etc.

Learning Skills

1) Research techniques.
2) Note-taking.
3) Outlining.
4) Listening skills
   (a) listen for ideas, not facts.
   (b) be an active, not passive listener.
   (c) listen aggressively,
       eliminate distractions,
       seek clarification or repetition when necessary.
5) Questioning skills.

READING ASSIGNMENTS

Allows an individual to learn from the experience of others and permits knowledge to become cumulative.

Can be incorporated into a training program as an adjunct to other means of obtaining knowledge, improving skills, or attaining or changing an attitude.

Program generally consists of specific reading assignments related to the subject at hand. Need to remember: reading is only one training tool among many available to the training director when preparing a specific training program.

Reading program also deals with discretionary reading,

where the individual has a choice as to whether or not he/she wants to read --

- program is designed to improve present job performance or to prepare oneself for promotion.

  Motivation = key factor.

Reading Lists

Range from titles of general reading material of business and social interest to specific books dealing exclusively with one subject. Format ranges from simple mimeographed sheets to elaborate booklets.

Lists can be prepared and organized by:

1) Checking several books on the subject for best bibliographies already compiled (must be up-to-date)

2) Libraries

3) Business book clubs

4) Training director can begin by reproducing selected articles from current publications.

5) Computerized bibliographical banks

▷ TEXTBOOKS

Provide prestructured way of presenting a specific body of information and assurance of complete coverage of subject matter.

1) Plan objectives first and then seek a text to fit those objectives.

2) Instructor should have final text decision authority.
   - This is the person who will have to work with it and with the trainees.

3) Text should not duplicate the course content exactly.
   - It should amplify and expand the in-class coverage.

4) Text should also be chosen to serve as a reference for post course use.

5) The text used as a refresher and reference, will best serve the trainees needs.

   - For this reason it is usually unwise to try to save on text costs by collecting them at the end of the course to use with subsequent classes.

MIMEOGRAPHED HANDOUTS

Handouts are made up by trainer to supplement the specific workshop.

Handouts may give to the trainee additional information which could not be covered in the workshop; or it may be used as a guideline for discussion during the workshop.

VERTICAL FILE

Collection of file folders containing short articles, pamphlets, brochures, etc., on alphabetically arranged topics, to which the student has free access.

An excellent learning assignment is also for the trainee to build his/her own vertical file on the subject being studied. Structuring the file headings can be a learning experience in itself.

MODELS

Students may build their own models which may be used later in teaching other students.

A model may be a three-dimensional scale reproduction, a two-dimensional symbolic rendering, or a conceptual model, i. e. an abstract conception which indicates steps and alternative paths of action.

LECTURE

1) Prepared, structured (i. e. organized in logical sequence) presentation of cognitive information for the purpose of having others understand or accept instructor's message.

2) Most lectures are to inform or instruct the listener, and to pass on a body of cognitive knowledge.

Criteria For Using Lecture Method:

1) The more instructor knows of the subject and the less the group knows, the more the lecture should be considered.

2) Size of learning group - the larger the group, the better the lecture method is likely to serve the needs.

3) Time factor - A lecture can deal with more facts, principles, and concepts in a shorter time than it would take to teach the same material by other methods.

4) Availability of reading and teaching materials.

5) Nature of information to be conveyed.

Advantages:

1) More direct.
2) Clearer.
3) More controlled by instructor.
4) Conserves time.

Disadvantages:

1) May be dull.
2) Lacks group participation.
3) Requires careful participation.
4) Requires speaking ability.

Components of a Good Lecture:

1) Must motivate group interest.
2) Must be well organized and clear.
3) Must be well developed.
4) Must be presented well.

5 Major Steps in Preparing a Lecture:

1) Analyze the learning group.
2) Determine the exact purpose to be accomplished.
3) Determine the main points, and do necessary research.
4) Organize the points and materials.
5) Develop and support the points.

▷ Lecturette or Mini-Lecture

"Talking to" sessions should never exceed 10 or 15 minutes (even when addressing adults) without interspersing other activities in between.

▷ ILLUSTRATED PRESENTATIONS

Using slides, overhead transparancies, opaque projectors, flip charts, models, etc.

In such presentations, the oral material should be structured so it is primary and could even stand alone if necessary. Do not let the illustrations be the entire presentation, and do not simply show the slides and make whatever comments the slides remind you to make.

▷ "SIBLING" TEACHING

Older students teach younger ones.
(Both the "teacher" and the "taught" learn from this experience).

▷ "PEER" TEACHING

Peers teaching each other.

▷ "RELAY" TEACHING

If many students are to be taught a specific skill, a small cadre can be taught, tested, and certified. They then, in turn, each teach 5 or 10 more who teach others, etc., in an ever-expanding audience.

▷ "TEAM" TEACHING

Each component of the team adds more to the total impact than the mere sum of the parts.

Caution: All teachers do not automatically work well together, and even the best-matched team must spend considerable time preparing their mutual presentations.

▷ "CO-TEACHING" CONVERSATION

Two experts on a particular subject (recognized experts, local residents or fellow teachers) first meet to agree on a skeleton outline as a structure for their presentation, but not on specifically what they are going to say. Then,

in front of the students, they converse freely, letting their differences of opinion be known, and responding to each other's comments. The outline provides a mechanism to keep the conversation on target but it should not be so detailed that it stifles spontaneity.

QUESTION - ANSWER SESSIONS

In addition to the normal question of students, the students can benefit from a chance to question experts (local citizens or teachers).

Questioning Can Be:

1) Ad hoc - anyone asking questions as he/she happens to think of them.

2) Systematic - by the students planning and organizing their questions and strategies beforehand. (This approach is much more likely to be productive).

SOCRATIC DISCUSSION

Method by which the trainees are asked questions in relation to the work that is being covered in the particular training workshop. From the trainee's responses, more questions are then asked, dependent on the responses already given. The entire session follows along using this pattern.

The trainer cannot rigidly control where the questioning will ultimately lead but must be thoroughly familiar with all aspects of the subject. The most capable trainer in using this technique is very skillful at asking the right questions in the right way to get the students to respond in the way in which they are being artfully guided to respond.

GROUP TECHNIQUES

PANEL DISCUSSION

1) Group of 3 to 6 persons who carry on a purposeful discussion of an assigned topic.

2) Panel members are selected on the basis of previously demonstrated interest and competence in the subject to be discussed.

3) Panel members are usually seated around a table in front of the audience.

4) Conversation among panel members is started by a moderator, who usually prepares questions in advance which he/she uses to start and sustain the discussion.

5) In its strictest sense there is no audience participation in the panel.

PANEL – FORUM

1) A panel which is immediately followed by an audience-participation period involving free and open discussion by the panel members on questions submitted by the audience.

2) Questions and comments can be presented directly from the floor by members of the audience, or they can be written on cards, collected, and read by the moderator.

"VETERANS" PANELS

"Veteran" implies anyone who has him/herself gone through any situation about which the students are currently studying. These veterans discuss, in a panel format, some of the experiences they have encountered during that particular situation. The great variety of interpretations, responses, and reactions to similar situations can be enlightening.

COLLOQUY

1) Modification of a panel, using 6 to 8 people.

2) 3 or 4 of the people are resource persons or experts, as in a panel.

3) Also, 3 or 4 people representing the audience sit on the stage.
   These people ask questions, express opinions, and raise issues to be treated by the experts.

4) A moderator usually directs the proceedings.

5) Generally, the members of the audience just listen, but occasionally they may participate, under the guidance of the moderator.

6) A colloquy helps to establish rapport between the audience and the experts.

SYMPOSIUM

1) A series of related speeches by 2 to 5 persons qualified to speak with authority on different

aspects of the same topic or on closely related topics.

2) Speeches vary in length from 3 to 20 minutes, depending upon the number of speeches, the amount of time available, and the topics to be treated.

3) Speakers do not converse with one another; they make their own separate presentations to the audience.

4) A Chairperson is usually in charge of the symposium.

SYMPOSIUM-FORUM

1) Symposium which is followed immediately by an audience-participation period of free and open discussion.

2) Moderator acts as a go-between for the speakers and the audience.

3) Provides for a limited degree of two-way communication.

SEMINAR

1) A group of persons gathered together for the purpose of studying a subject under the leadership of an expert or knowledgeable person, often over an extended period of time.

2) Procedure followed:

(a) Identify the problem.
(b) Explore the problem.
(c) Discuss or lay out necessary research involved in the solution of the problem.

(d) Conduct the research.
(e) Share the findings with others in the group.
(f) Reach a conclusion on the basis of the research.

CONFERENCE

1) Group composed usually of 25 to 200 persons who represent different organizations, departments, or points of view but who have some common interest or background.

2) They gather information and discuss problems, with a reasonable solution (usually improvement of job performance) as the desired end.

3) Problem identification and solution is often the objective of a conference.

4) Conferences are also used to interchange information and to improve cooperation.

5) They are "successful" to the degree to which all contribute from their own experiences and comment upon the experience and opinions of others, and to the degree to which all come to understand the significance of group experience and opinion.

Conferences will usually succeed if the following conditions are met:

1) Choice of a qualified leader

2) Well-organized and carefully selected conference groups (proper grouping of employee levels or organizational levels for purpose involved)

3) Sessions of definite length and frequency

4) Adequate conference room facilities.

5) Carefully selected and well-prepared conference materials.

Conference Leader:

1) Reemphasizes and restates the important points, ideas, and decisions arrived at by the group (at the end).

Leading A Conference - 4 Steps:

1) Open the Conference:

Introductory remarks, state purpose (objectives) announce problem or topic to be discussed, and define the procedure to be followed.

2) Present the Topic or Problem to Be Discussed:

Open discussion in one of the following ways -

state the facts;
ask questions;
state an opinion;
use a demonstration, case study, chart, film, etc.

3) Conduct the Discussion:

Indicate the highlights of the conference, arrive at conclusions or solutions, decide on a plan of action.

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*Source: Training and Development Handbook (Second Edition) (ASTD) Editors Craig & Bittel (McGraw-Hill, 1976) Chapter 9

WORKSHOP

1) A group of persons with a common interest or problem, often professional or vocational, who meet together for an extended period of time to improve their individual proficiency, ability, or understanding by means of study, group exercises, research, and discussion.

2) A workshop allows considerable flexibility, and the emphasis is on improving individual proficiency and understanding.

3) Theory and practice are treated concurrently.

4) The learner is encouraged to work out a program of personal study and receives help with this program from the other participants and resource people.

5) Learning situations tend to be based on interests and needs identified by the participants themselves, rather than imposed upon them.

6) The various workshop leaders are chosen because of their working knowledge in the aspects of the subject.

CLINIC

1) A meeting of a group of people with common interests.

2) Established for the purpose of diagnosing, analyzing, and seeking solutions to specific problems.

3) The group usually confronts real-life situations in order to establish a manner and method to meet them more successfully.

4) Often case studies, demonstrations, role plays, field trips, and shared real-life experiences form the basis for the diagnosis and solution of problems.

INTERVIEWING TECHNIQUES

Concepts:

1) Purpose --

to obtain information relative to a specific interest, issue,or problem from a human source.

2) The interviewer must be able to listen to his subject in order to understand how the subject perceives the issue being addressed and to understand what he/she is saying about it.

3) The interviewer must be non-judgmental.

Skills:

1) Listen carefully and accurately

2) Ability to express respect and acceptance of the interviewee

3) Ability to direct an interview so that neither interviewer nor interviewee lose sight of its purpose

4) Ability to remain honest with the interviewee in the context of the interview

5) Trainee must develop an equally keen sensitivity of his own values, perferences, and biases.

Skill Development:

1) How to determine the purpose of an interview, the nature of information sought, and the appropriate techniques to be used.

2) How to communicate purposes and ask questions in a non-dictatorial manner.

3) How to create an accepting atmosphere with the interviewee.

4) How to clearly communicate what the interviewer means.

5) How to listen and understand what is being said.

6) How to become self-aware of personal prejudices and values and how to control them.

Techniques To Develop Skills:

1) Case method approach.

2) Study-lecture of different types of interview situations, purposes, and objectives.

3) Role-playing techniques.

4) Sensitivity groups to help trainees identify and become aware of their feelings, values, and biases.

BRAINSTORMING

1) Very simple procedure.

2) Need 2 or more people (6 to 8 is a good maximum number).

3) Ask individuals in the group to call out any ideas they have for answering a specific question.

4) Let imagination go wild.
We want to collect as many ideas as possible.

5) Write down all the possible solutions within a short, pre-announced time limit.

6) The only rule is that no one is allowed to react negatively to any suggestion.

   - All evaluations and criticisms are to be suspended until the brainstorming session is over.

7) No suggestion is any person's sole property; i. e., anyone should feel free to "take off" on and build on anyone else's idea.

8) When the time limit is up, examine the lists

   - Evaluate the ideas and select the best solutions.

   - Identify items which call for additional knowledge, skill, or attitude - these are training needs.

FORCE-FIELD ANALYSIS

A simple process which is often useful in problem-solving. Two lists are made, one listing all the "factors operating for" and the other, all the "factors operating against" any issue in question.

An important point to remember is that problem situations can often be resolved more effectively by striving to reduce the forces against rather than by trying to increace the forces for a hoped-for outcome (because increasing the forces in favor of something often only encourages the opposing forces to increase their efforts, in a "backlash" effect).

DECISION BY CONSENSUS

1) Consensus is a decision process for making full use of available resources and for resolving conflicts creatively.

2) Consensus is difficult to reach, so not every decision will meet with everyone's complete approval.

3) Complete unanimity is not the goal — it is rarely achieved.

4) Each individual should be able to accept the group decision on the basis of logic and feasibility.

-When all group members feel this way, you have reached consensus, and the judgment may be considered a group decision.

Guidelines in Achieving Consensus:

1) Present your position as lucidly and logically as

possible, but listen to the other members reactions and consider them carefully before you press your point.

2) Do not assume that someone must win and someone must lose when discussion reaches a stalemate. Instead, look for the next — most — acceptable alternative for all parties.

3) Do not change your mind simply to avoid conflict or to reach agreement and harmony. Yield only to positions that have objective and logically sound foundations.

4) Avoid conflict —reducing techniques such as majority vote, average, coin flips, and bargaining. When a dissenting member finally agrees, don't feel that he must be rewarded by having his own way on some later point.

5) Seek out differences of opinion and try to involve everyone in the decision process.

- Disagreements can help the group's decision because with a wide range of information and opinions, there is a greater chance that the group will hit on more adequate solutions.

▷ "AGREE - DISAGREE" STATEMENTS

This is a variation on the consensus method.

A list of true — false type statements is given to a group; the group is asked to respond, first of all individually to the statements, indicating whether they agree or disagree with the sentences as stated. (Most or even all of the statements should be unacceptable as presented).

Then, in small sub-groups of 4 or 5, they are to tally responses and change the statements in any way so that the whole group can accept the statement as changed, i.e., if even one member of the group disagrees with a statement as presented, the group should change it to make it acceptable to all. (They may not simply "agree to disagree" with the statement.) Someone should record the acceptable version of each statement for later reporting it to the entire group.

BUZZ GROUPS

1) Group dynamics techniques are used to tap the thinking of a group for possible solutions to a common problem, to develop a procedure, etc.

2) Consists of:

   (a) Dividing the audience into small groups of 4 or 5 persons.

   (b) Each group chooses one of its members as Chairman and another as Recorder (to write all ideas down).

   (c) At a signal each group starts to discuss the question at hand.

   (d) At the end of the work period (10-20 minutes) the group reassembles.

   (e) The Chairman of each group reports from his recorder's list what his group has produced. Each item is written on a blackboard or a flip chart.

   (f) When all groups have reported, final ideas are added from the floor.

   (g) Later the list is classified for further use.

DELPHI TECHNIQUE

1) Method of systematically soliciting, collecting, evaluating, and tabulating expert opinions, usually in long-range forecasting.

2) Conducted anonymously in order to reduce distoring factors common in committee decisions, such as: unwillingness to contradict publicly expressed opinions, bandwagon effect of majority opinions, etc.

3) Delphi technique is a "quantitative intuition" of experience, judgment, and a sort of intuitive perception.

   In assessing training needs, the Delphi technique can be used most usefully for forecasting future training needs in relation to long-range company plans or objectives.

Technique Works as Follows:

1) An opinion is asked on a particular question or problem.

   - Statistical results are then gathered, indicating the distribution of responses, median response, and the interquartile range.

2) The results of this tabulation are again distributed to respondents, who are asked to reconsider their answers and revise them if they want to.

   - If the answers of the respondents are outside the inquartile range (middle 50% of responses) they are asked to state

briefly why they feel their answers were much lower or much higher than the majority of opinions.
This allows respondent to justify and defend their answers.

3) Statistical results of the second survey are gathered. The reasons for the extreme answers are also summarized and presented.

4) The results are redistributed a third time, and respondents asked to revise their opinions once more if they choose. The median of the final responses gathered is taken to represent the group consensus.

MICRO-TEACHING

- A very small task or sub-task is concentrated on in order to facilitate its learning.

- The student performs this task while the teacher observes, then the teacher critiques and immediately the student is given another chance to present the same material.

- Other students may function as observers or they may serve as students if the performing student is teaching them the particular skill.

- A VTR is often used to record each micro-session for immediate playback and critique.

"FISHBOWL" MEETINGS

One group sits in the middle of the room and has a meeting or a discussion while the others ring their chairs around the group and observe the process. After a certain time, the meeting may be opened up for observations or questions from the observers.

GROUP-ON-GROUP MEETINGS

Similar to the "Fishbowl" technique, except that the group is divided exactly in half, and one group holds its meeting in the inner ring while the other half lines up one-on-one, each observing the behavior and contributions of a single participant with whom he has been paired -- in order to give that person helpful beedback about his style later. The groups then reverse positions and roles.

CHARETTE

1) An intensive planning session where community members are brought in to critique a major plan or model for intended action.

2) Under the guidance of consultants, citizens contribute suggestions and ask difficult questions.

3) This leads naturally to a discussion of the problems, with all working to resolve conflicting desires and to actively plan together.

4) The charette provides the forum to get community hopes and dreams out in the open where they can be measured against the total community opinion and against the practicalities of the project itself.

STRUCTURED EXPERIENCES

1) These experiences are designed to focus on individual behavior, constructive feedback, processing, and psychological integration.

2) They can be integrated easily into the particular needs of the group, the aim of a training design, or the special competencies of the facilitator.

3) Considerations in developing a structured experience:

Goals - should be limited in number and stated in language that participants can understand.

(a) Specific, not general goals;

(b) Performance – oriented;

(c) Observable;

(d) Involves the individual in the goal objective;

(e) Realistic.

4) Group Size

(a) Minimum and maximum number of participants;

(b) Optimum size of the group;

(c) The number and size of sub-groups.

) should be noted where relevant

5) Time Required

Should be based on actual trials of the experience.

6) Materials

(a) Criteria should be easy availability, utility, and uncomplicated preparation.

(b) The specific forms, sheets of information, or worksheets needed and the quantities of each should be listed.

(c) Audio-visual aids, pencils and paper.

(d) Observer sheet should be devised for the activity.

7) Physical Setting

(a) Determine the participants' needs:

- groups should be private, isolated
- sit around tables, etc.
- need writing surfaces
- outdoors?
- easily movable furniture

8) Process

(a) Step-by-step procedure that should indicate what the facilitator does and says and what the participants do in the appropriate sequence.

(b) The beginning and end of each step should be specified.

9) References

When relevant, lecturette sources or background reading should be indicated.

10) Credit Line

Ideas and designs of others should be acknowledged - with their contributions.

11) Worksheets

Should be designed and written so that they have sufficient room in which participants may write; are simple and easy to reproduce; have clear instructions; and are necessary and meaningful to the activity.

* 12) Handouts

Useful for a discussion of the theory underlying new behavior suggested by the structured experience.

HUMAN RELATIONS LABORATORY TRAINING

Goal:

1) To improve the quality of individual leadership and membership.

2) Addresses the problem of the management of human resources to achieve organization goals and to provide individual work satisfaction.

Training Objectives:

1) Develop self-understanding

2) Ability to listen and to communicate

3) Awareness of interpersonal and group dynamics

4) Capacity to diagnose and solve interpersonal, group

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*Source. Annual Series of Handbooks and Annuals, J. William Pfeiffer and John E. Jones. Available from: University Associates, 7596 Eads Ave., La Jolla, Calif. 92037.

and organization problems.

Organizational climate developed in the Human Relations Laboratory -- in forming themselves into an organization -- generates the same kind of human problems encountered elsewhere in organizations:

1) Tensions between people and between units.

2) Establishing and maintaining status.

3) Power and status struggles.

4) Rewarding and punishing behavior.

5) Controlling and regulating.

6) Managing resources to accomplish tasks.

7) Developing teamwork and support systems.

* Professional Standards for Trainers:

1) Accrediting organization - International Association of Applied Social Scientists (IAASS).

2) Purpose:

(a) To establish standards of competence for practitioners.

(b) To develop certification process for these practitioners.

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*Source: Training and Development Handbook, 2nd Edition, ed. Robert Craig, 1976, pp. 37-1 to 37-15. Also NTL (National Training Laboratory), 1815 N. Ft. Myer Drive, Roslyn, Va.

Specific problems which arise within groups:

1) Getting the group started

2) Individual members who try to assume Chairman-type leadership in purposeful absence of authoritarian group leader

3) Group silence

4) Talking about irrelevant issues

5) The member who monopolizes the meeting

6) The quiet member

7) Side conversations which distract the group

8) The member who threatens to quit

9) The return of the absent member

10) Fighting between group members

11) The angry group

12) The over-polite group

13) Sexual distractions

Process Observations of Group Development

1) Take place at end of session by staff.

2) Give time for discussion of the observations.

3) If the group has met a few times, it is best if the feedback consists, for the most part, of observations of individual behaviors in the group.

4) Process Observations Sheet:

- Staff member records and reports his/her observations.

- Tally the number of statements made or questions asked by each person for each category and report the totals.

- The results help to sharpen the sensitivity of the participants to what is happening in the group.

5) Sociogram :

- Staff member plots the number of times each person addresses or responds to each other person.

- Usually shows that certain persons usually talk only to certain other persons. The group then discusses the implications of this in relation to group effectiveness.

When doing a process observation, examples of what to look for are:

1) Initiating, suggesting, proposing

2) Information giving

3) Opinion giving

4) Information seeking

5) Opinion seeking

6) Elaborating, clarifying

7) Seeking clarification

8) Summarizing for the group

9) Testing for agreement, consensus

10) Indicating agreement or disagreement

11) Supporting, encouraging

12) Gate-keeping, facilitating

13) Harmonizing, compromising

14) Providing feedback

15) Tension reducing, joking

16) Complaining, criticizing

D-GROUPS (DEVELOPMENTAL GROUPS) (LEADERLESS GROUPS)

1) Interpersonal development through "D" group interaction requires that a leaderless group be given a prescribed set of objectives to achieve within a limited period of time.

2) This simulated pressure tends to bring to the surface a trainee's habitual mode of resisting participation and points out, without threatening self-esteem, that new behavior patterns are required to continue learning from life experiences.

3) Learning community is based on the laboratory approach to training -- trainee-centered, experience based, learning by experimentation and discovery.

4) Each "D" group should consist of approximately 8 to 10 trainees and should be heterogeneously comprised, for maximum interaction and effectiveness.

5) Groups have responsibility of creating a climate that will allow for maximum individuality of its members and respect for individual differences.

6) No trainer present, but a trainer is useful in helping the group to process (analyze) their experience.

SIMULATION TECHNIQUES

CASE STUDY METHOD

This method employs an actual occurrence that typifies a problem which the trainee is likely to encounter. The information given in the study is assumed to be all that is available (thus realistically simulating the new experience where only limited information is available).

- Case may be incomplete or contradictory - will require that the participants infer other facts or make inquiries to gain additional relevant information.
- Case discussed in a group situation.
- Members make observations, raise questions, and offer contingency "solutions" to the problem presented. The group leader helps them realize the implications of their suggested solutions and helps them realize there is never one right answer for all situations.

Advantages:

1) Used to bridge the gap between theoretical guidelines and real life through an exposure to the wisdom and understanding that can be accumulated through experience.

2) Trainees must think out original answers for themselves

- learning how to "deal with" different types of problems rather than learning a set of solutions per se.

3) Trainer avoids being perceived as one who knows the right answers; he encourages diverse opinions and thinking for one's self.

- Tries to get the trainees to become aware of the assumptions that influence their thinking.

- Likely to be restating an idea, summarizing, or raising questions, rather than offering information or opinion.

Two Other Approaches to Case Studies:

1) Multiple-Attack Approach

- A simple case study, outlining the salient conditions of the problem under study, is given to each of the participants in a small group. Each is asked to give a brief written reaction specifying what he/she would do to solve the problem as stated.

- Responses are thrown into a hat, and each member draws out an answer, reads it aloud, and then proceeds to defend it before the group, as if it were his/her own - whether he/she agrees with it or not.

- Designed to give the trainee experience in thinking on his/her feet and in developing an offensive movement out of a defensive position.

2) Maze Technique Approach

(a) Case study is divided into several short episodes, calling for a multiple-choice decision at each step of the way.

(b) The choice that is made then requires each participant, working independently, to turn to a specific page for the next step, until he/she moves through several phases, as in a maze, to the culmination.

(c) Of the several choices available, only 2 or 3 of the alternatives lead to a final result which is termed "successful".

(d) Reasons are detailed, in the final step, as to why the decision finally reached is considered successful or not.

CRITICAL INCIDENTS

1) Critical incidents are specific behaviors that have been found to make the differences between success and failure in carrying out a job.

2) These incidents are collected from incumbents in the job as well as their supervisors and other personnel involved in the activity.

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*Sources:

1. Case Method in Human Relations: The Incident Process, Paul and Faith Pigors (McGraw-Hill, New York, 1961).
2. Handbook of Creative Learning Exercises, Engel - for help in how to write a case study.
3. Training and Development Handbook (2nd Edition), ed. Robert L. Craig (ASTD) (McGraw-Hill, New York, 1976) - Bibliography of Sources: pp. 35-11 to 35-12.

3) First, it must be established that the incidents are truly critical.

4) After this is established, the behavior descriptions are grouped into major performance areas and into subgroups within major performance areas.

5) These are next incorporated into a performance evaluation record with provisions for checking both effective and ineffective critical incidents as they are observed by the supervisor.

Application to Training Needs:

1) The trainer of the person being rated has a basis for individual coaching and on-the-job training.

2) The personnel staff can review the history of the progress of each individual by reviewing the sequence of the past performance evaluation reports.

3) When a sufficient number of employees in a given job category exhibit ineffective critical incident behaviors, or when less than a reasonable amount of effective critical incident behaviors are being recorded for them, the training staff can organize courses designed to produce more effective behavior patterns in that job category.

Sources:

1. Mayeske, G, Francis Harmon, and A. Glickman: "What Can Critical Incidents Tell Management?" Training and Development Journal, pp. 20-34, April 1966.

2. Training and Development Handbook (2nd ed.), ed. Robert L. Craig (ASTD) McGraw-Hill, New York, 1976.

PROBLEM SOLVING/SCENARIO TECHNIQUE

Steps Involved:

1) Presentation of a scenario which incorporates relevant social, political, and economic information and which places the trainee in the scenario confronted with the problems, stated and implicit, which the scenario poses.

2) Division of the group into small groups of trainees with the assignment of discussing the scenario, making additional assumptions as necessary, and coming up with a set of proposals which suggest tentative answers to some of the questions raised in the scenario.

3) Reconvening of the large group to critically discuss the proposals as they are presented.

4) Introduction of additional scenario material, providing hitherto unknown information to be processed.

5) Recycling.

Objectives of Scenario Method:

1) Improve problem-solving skills.

2) Create awareness of self.

3) Impart technical and cross-cultural information.

4) Group dynamics - for group to reflect on what is happening, how they feel, etc.

5) People learn how to learn through scenario. It integrates and makes relevant all training content and processes.

Important in Working With a Scenario Are:

1) Staff -

Trainers should be comfortable with the scenario method and able to make groups function.

2) Scenario -

Has to be "real", dynamic, well written, enabling the trainee to conceptualize the situation and himself in it.

3) Information for Recycling -

If recycling is contemplated, good information must be available.

4) Emphasize that there is no right answer -- that answers or solutions or plans depend upon your personal style.

- Trainees become a part of the dynamic of the scenario and move in their own directions.

Scenario

- Attempt to build the trainee's entire learning experience upon the analysis of a constantly developing case-study.

- The scenario itself is like a community description, but very job and culture-specific, written in colorful physical, economic, and social terms, with particular attention to the personalities and inter-community human dynamics.

Scenario - Continued:

- The scenario contains all of the information pertinent to a particular job decision or problem-solution. Direct quotations should be used whenever possible.

IN-BASKET EXERCISE

Presents management problems to the individual trainee in the form of written materials which might realistically come across a manager's desk.

Includes: letters, memos, notes from the boss, records of telephone calls, appraisal forms, routine reports, etc.

1) The person being assessed usually told that he/she has come into a new job which has been vacant for several weeks. Things have piled up, and the assessee has come in for the first time on a Sunday afternoon to spend a few hours catching up on things.

2) Assessees are instructed to deal with the materials as they think they would in the real situation, except to make more of a record than they otherwise might of the actions they intend to take.

3) The exercise is usually followed by an intensive interview.

   - The assessor digs into the assessee's reasoning and perceptions about the various items in the basket and into the causes of his/her decisiveness or indecisiveness.

* Used to Test:

1) Planning and organizing work.

2) Managing and motivating staff.

3) Leading, negotiating, representing, and mediating.

4) Analysis and synthesis (problem-solving approach).

5) Intrapersonal awareness and skills.

6) Quality of judgment.

7) Adaptability and flexibility.

In-Basket Tests designed specifically for your organization can be developed, verified, and scored by Educational Testing Service, Princeton, New Jersey.

* Sources:

"Handbook of Structured Experiences for Human Relations Training", Pfeiffer and Jones, Vol. II, p. 44

"Training and Development Handbook" (2nd Edition), ed. Robert L. Craig (ASTD) McGraw-Hill, New York 1976
- Bibliography of Sources: pp. 16-4; p. 16-15

PLAYS

Role-Play Scripts are written by professional playwrights:

- Trainees act out preferred behavior patterns for prescribed situations.
- Trainee has an opportunity to practice interpersonal and social skills within a protected environment.

ROLE PLAYING

A simulation technique in which a trainee is told to "act out" the behaviors which he/she believes are required by a particular situation, position, or job. Both he/she and the audience will then process this performance.

Use of Role Playing:

1) Skills Training -

   to emphasize a technique that may make the trainee more effective personally in a particular situation.

2) Instructional Aid -

   to give a live demonstration in communicating information.

3) Understanding Others and Oneself -

   through experiencing the reactions produced in others in his/her role-playing, the trainee becomes aware of the effect of a particular behavior on the attitudes and feelings of others,

while at the same time becoming aware of his/her own motives for this behavior.

Types of Role Playing

▷ 1) Single Role Plays -

- Consists of 2 or 3 people playing out roles in front of the group
- Best when demonstrating how certain types of problems can be dealt with
- Entire class may examine and later discuss the dynamics and complexities involved when individuals attempt to solve a problem

▷ 2) Multiple Role Plays -

All trainees are players. Class is broken up into groups and the entire class role-plays at the same time.

- Allows everyone to participate
- Shows variety of conclusions and decisions that may be reached by many individuals

▷ 3) Role Rotation -

Having one person play a role, usually that of an individual who has a problem or is creating a problem, and having several class members attempt to use their skills to handle the situation

3) Role Rotation - Continued:

- Done in sequence - a number of persons rotate in the same role.

▷ 4) Spontaneous Role Playing -

Tends to be used more often to help participants acquire insight into their own behavior and attitudes or the behavior and attitude of others.

- Trainer elicits some problem from the group and then directs an enactment of the problem.

- No written roles are used.

- Advantages:

  - Tends to delve more deeply into the motivations and assumptions that influence a role player's behavior.

- Disadvantages:

  - Requires extremely high skill on the part of the trainer.

  - May embarrass people (like single role-play).

  - Most of class learning is from observation rather than practice of skill.

Steps in Role Playing:

1) Warm-up -

   - Develop some class motivation for any planned role-playing activity.

     Objective: Trainer must deal with: any possible anxiety the trainee may have about role playing; and the level of motivation of the trainee.

2) Enactment -

   - Actual role-playing exercise

3) Postenactment Discussion - for closure

   - The issues and problems that develop during the enactment should be brought out so participants and observers have a better understanding of the implications for them of the roles.

Videotape Playback (with role-playing)

- Intention is to demonstrate to the trainee certain behavior that the trainee has engaged in, through self-observation rather than by being told.

Sources: Training and Development Handbook, ed. Robert L. Craig McGraw-Hill Pub. New York, 1976, pp. 36-1 to 36-13, contains bibliography
Handbook of Structured Experiences for Human Relations Training, eds. Pfeffer & Jones (University Associates Publishers) All volumes (1-5)

SOCIODRAMA

An expansion of role-play; an adlib dramatization of a specific social situation involving interaction between groups which have radically different sets of values.

- Involves bringing together a small group consisting of trainees and several members of the population with which they will eventually work.
- The trainees are given an opportunity to role-play within naturalistic assignments, meeting frustrations they are likely to encounter on the job, and attempting to discover viable solutions to actual problems.

NONVERBAL EXERCISES

Useful to gain physical release for emotion, to demonstrate and allow an overt expression of feelings, and to reduce inhibitions or break down barriers to participation in a greater-than-usual range of life experiences.

Different Areas of Non-verbal communications:

1) Kinesics
2) Proxemics
3) Chronemics
4) Oculesics
5) Haptics

Sources of Information on Non-verbal communications:

1) The 1977 Annual Handbook for Group Facilitators, eds. J. Jones & J.W. Pfeiffer (University Associates, Inc., 1977) pp. 227-237.
   - Contains a bibliography of books, literature, research, and training aids.

2) Specific exercises:

(a) A Handbook of Structured Experiences for Human Relations Training, Pheiffer and Jones (University Associates Press), Vol. 1 pp. 109-111; Vol. 2, pp. 102-104.

GAMES AND SIMULATIONS

Game:

Formalized activity consisting of 2 or more players who try to meet their objectives within the limitations imposed by a set of rules, which determine the game's activities and termination.

Simulation:

Representation of a real-life situation which attempts to duplicate selected parts of the situation along with their interrelationships in such a way that it can be manipulated by the user.

Gaming Simulation:

Wedding of a game and a simulation. The game players act within and upon the simulation and receive feedback from it which affects the game activity.

3 Components of Gaming Simulation:

1) Roles -

which define the players.

2) The Scenario -

describes the situation used in the gaming simulation.

3) Accounting System -

a set of procedures developed for monitoring and recording the status of the system being explored in the gaming simulation. The system records the effects of role-decisions and provides feedback appropriate to the individual roles and to the system as a whole.

Properties of Games:

1) Basic elements are players, each striving to achieve his/her goal.

2) Limited to a small, fixed set of players.

3) Roles limit the range and define the nature of legitimate actions of the players.

4) Rules establish the basic order, sequence, and structure within which the actions take place.

5) It is delimited in time as well as extensiveness, with an end defined by rules.

6) Its rules constitute a temporary suspension of some of the ordinary activities of life and roles of behavior by substituting for them these special time-and-space delimited ones.

Use of a Gaming Situation:

1) Helps to increase player motivation.

2) Provides a systematic method for exploring issues.

Use of a Gaming Situation Continued:

3) Players have the opportunity to learn skills in a context similar to that in which they will be used.

4) Requires players to make decisions and commit themselves to a course of action

5) Provides a concrete reference point for use in discussing complicated concepts and ideas

6) A risk-free environment is provided which encourages experimentation and provides immediate feedback.

Advantages:

1) Opportunity for player to apply prior learning

2) Opportunity for player to gain insights into human behavior

3) Learner is active throughout

4) Feedback is immediate

5) Time can be compressed as compared with real-life events

6) Discussion is realistic

Disadvantages:

1) Participants might not take the situation seriously

2) Requires a skilled, experienced instruction to administer them

3) Can use valuable lecture (classroom) time

Consideration When Using Gaming Simulations:

1) The trainer needs to be comfortable with a flexible, unstructured, interactive learning environment.

2) Instructional context - should be placed carefully within the context of other training activities

   - Provides an environment for dealing with already considered material and a basis for new learning activities

3) Gaming Introduction - only enough information should be given to players so they can play the game without being confused.

4) Debriefing -

   - Players should be encouraged to explain their actions in the game as well as critique the game and the situation, and a symbolic "derobing" (such as all players ceremonially throwing their arm bands into a common wastebasket) to end any animosities accruing during the course of a competitive game to be destroyed.

Criteria For Evaluation:

1) Simplicity

2) Revising the model -

   - provisions for the revisions of the model should be built into the model whenever possible (To see if the game can be adapted to fit your needs).

* 3) Timing

- The pace should be timed to sustain action throughout the game.

▷ Community Simulation

A community simulation is like a large group role play in that it involves the entire class, but each is on his/her own as he/she interacts, in turn, with several staff members playing their roles as various key community figures.

A trainee is selected from the audience and told to go into the community to perform a particular task. He/she is given a minimum of information, proceeding to each station (key community figures) who is considered relevant to performing his/her task and to do "whatever should be done" in that situation.

- After interacting with several stations the trainee's action is frozen by the trainer and the "community" is asked to respond. This continues until the task has been accomplished or until the trainee is asked to leave the community.

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*Sources:

Abt, Clark, Serious Games (Viking Press, Inc. : N. Y.) 1970.
Armstrong, R. & M. Hobson An Introduction to Gaming/Simulation Techniques (Univ. of Mich.) 1971.
Carlson, E. Learning Through Games (Public Affairs Press: Wash.) 1969.
Kletsch, R. Directory of Educational Simulations, Learning Games and Didactic Units (Instructional Simulations, Inc., Minn.) 1969.
Pfeiffer & Jones. A Handbook of Structured Experiences for Human Relations Training (University Associates) Vol. 1, 2, 3.

- Several trainees go through this exercise - when finished, what took place is thoroughly analyzed and discussed.

- The simulation makes the trainee aware of the interactions typical of that community, points out his/her own approach to the members of the community, and shows how he/she should proceed in establishing him/herself in the community.

PRACTICAL

EXPERIENCES

FIELD TRIP

1) The principle use of the field trip is to introduce trainees to learning on their own and to discourage excessive dependence on the staff or the group as a whole.

2) Each field experience should contain tasks for the trainees to perform. The task focuses the trainee' attention on aspects of the job, the culture, or even the language which might otherwise be overlooked.

3) Basically, it is training under actual or near-actual field conditions.

4) Benefits:

   (a) on-the-job technical training;

   (b) community surveying;

   (c) familiarity with potential assignment sites;

   (d) increased self-awareness;

   (e) self-assessment.

Field Trip Continued

5) Trainees should be visited at field sites at least once by a staff member. The visit should be neither so early that the trainee has not time to get on his/her feet, nor so late that the staff visit is of no use to the trainee.

Debriefing after field trips:

1) Helps trainees evaluate their field experience by focusing on the trainees own personal reactions to the situation rather than on the "strange" customs and conditions they encountered.

USE OF COMMUNITY RESOURCES*

Implies delving deeply into the resources of the community (newspaper plant, banks, wholesalers, retail stores of all varieties, law offices, factories, public utilities, municipal and county offices, business offices, non-profit organizations which depend heavily on volunteers, fire department, police station, courts and jails, hospitals, etc.) to learn all one can from them.

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*Source: Yellow Pages of Learning Resources, Richard Warman, editor. (Aspen, Colo.: MIT Press, prepared in connection with the 1972 International Design Conference).

COMMUNITY ANALYSIS*

Analysis should be conducted by a small group (8 to 10) of trainees - dividing the responsibility to gather data and information among themselves and to collaborate in preparing the final written analysis.

Provides actual experiences where the trainees must not only work with the development of a group plan or decision, but also participate in carrying out such plans.

Trainee learns to take responsibility for his/her decisions in the "real world".

"LIVE-INS"

(with Ghetto families, etc.)

- There is no better way for middle class white students to learn what it is like to live in the ghetto than for them to actually live for a week or more with a ghetto family. The trainee experiences what another culture is like (its values, beliefs, etc.), while living with the family.

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*Sources: Community Profile Handbook, General Learning Corporation, Washington, D. C., 1970; or Use a Survey to Fight Poverty, New Jersey Community Action Training Institute, 2465 So. Broad St., Trenton, New Jersey, 1970.

THIRD-CULTURE EXPERIENCE*

1) An experience in a culture or community unlike that which the trainee has known (and different from the one he/she is preparing to eventually serve in) can be one of the most effective and powerful a training program can provide.

2) Interacting with a culture unlike his/her own, a trainee can:

   (a) "learn how to learn" from daily intercultural experience.

   (b) learn to be aware of and to deal with his/her own feelings and reactions in a different culture.

   (c) learn coping and adjusting behaviors.

   (d) begin to develop and practice some of the skills needed to understand, conceptualize and analyze a community or a group of people.

   (f) compare his/her own culture with that of the third culture; become more analytical, objective, and sensitive.

3) Staff should define the particular needs of their program, decide on an objective tailored to this need, then plan the community experience to meet that objective.

*Source: Guidelines to Peace Corps Cross-Cultural Training, Albert Wight and Mary Anne Hammons, Vols. I & II(published by Center for Research & Education, Estes Park, Colo., for Office of Training Support, Peace Corps, Washington, D. C.

4) Wide range of community experiences:

(a) 2 or 3 day exposure to a strange community.

(b) Program where trainees live throughout the training experience among the people of the third culture.

▷ DIRECT MANIPULATION LABORATORIES

1) Laboratory setups allow individuals to manipulate the tools of their own learning situation and to see the results immediately.

2) Costly to produce, so they can only be produced if there is a sufficiently large number of trainees to be trained over a long enough period of time.

▷ LABORATORY EXPERIMENTS

- The trainer sets up a controlled environment in order to observe a specific phenomenon.

- The trainer sets out to see if a specific hypothesis is significantly true or false.

- The atmosphere eliminates the chances of any extraneous variables contaminating the results of the experiment.

▷ ON-THE-JOB TRAINING (OJT)

1) Trainees get an opportunity to acquire first-

On-the-Job Training Continued:

hand experience in the type of work they will be doing and to meet many of the community residents with whom they will be working for the next year.

2) On-the-job training program should provide trainees with experiences that permit planning and supervision, and, at the same time, a high degree of individuality and creativity.

3) At completion of on-the-job training, the trainee should demonstrate an increased ability to plan, work independently and with others, communicate, and evaluate facts as well as people.

- Community analysis should precede on-the-job training assignment.

- Sponsor is asked to participate as much as possible during on-the-job training.

- Daily meetings between the training staff and the sponsor staff should take place. These sessions are to keep the sponsor informed on what problems and progress have occurred and, at the same time, to answer any questions pertaining to training techniques.

AUDIO - VISUAL

SUPPORT

CHALKBOARD (BLACKBOARD)

Aids in presentations, instruction, and conceptualization

- Punctuates a presentation with specific visual reinforcement.
- Available in several pastel shades.
- Many chalkboards have metal backings to permit magnets to be used to attach visuals.

When using the chalkboard:

1) Move away from what you write or print.
2) Make sure all work is large, clear, and fully readable.
3) Favor the upper rather than the lower section of the board.

When using the chalkboard: Continued:

4) Prepare complex drawings in advance, but keep them covered until the appropriate time.

5) Use legible colored chalk for easy data differentiation.

6) Develop complex points step-by-step.

7) Keep the blackboard clean.

FLIP CHARTS

A series of visual sheets (usually paper or plastic) hinged together as a display unit. The separate sheets are flipped into view as you progress through the presentation. Need to concentrate on an orderly sequencing of points.

When using a flip chart:

1) Condense information.

2) Do not use more than 4 or 5 word per line.

3) Use large symbols and abbreviations.

4) Eliminate every unnecessary word or figure.

5) The larger the symbol, the greater its visual impact will be.

FLANNEL BOARDS/CHARTS/GRAPHS/ DIAGRAMS/ILLUSTRATIONS/POSTERS:

Flannel Boards

Provides a way to build up points in a presentation. The flannel material on the board has an adhesive quality to which cardboard (or other light materials) sticks when it has a backing of "floktite" or sandpaper.

The floktite-backed cards should be placed on a table near the flannel board at the proper time. The presentation data must be positioned properly in relation to other posted material.

Charts

- Represent information in some visual, orderly, arranged form which might otherwise be difficult to explain in only words
- Useful in condensing data to a more readily remembered format

Graphs

- Accurate representation of measurable data
- Present data in a less confusing, more interesting way

Types of Graphs:

1. Pictorial
2. Bar

Graphs: Continued

3. Circular

4. Line

Each type is helpful in drawing comparisons between factors and data, such as quantity, development, and function.

▷ Diagrams

- Line drawing made to explain the interrelationships between facts or functions.

- Diagram can range in style from a simple sketch to an intricate schematic one.

▷ Illustrations

- Drawing intended to elucidate a point or show an example, e.g., a

  Cartoon --

  A freehand interpretation of a situation using symbolization and exaggeration to carry a message or point of view across to the audience

- Commands attention

▷ Posters

- Makes its point through a picture or drawing and a brief slogan

- Usually calls for some type of action

▷ OPAQUE PROJECTOR

Ability to project an image of any flat opaque illustration or copy. A one-step process which need not be converted to any other format.

Use:

1) When intricate drawings need to be examined by a group.

2) To trace drawings onto chalkboards before the session.

3) Need to keep material simple, so that every element when projected, is big enough and clear enough for every viewer to see it.

▷ OVERHEAD PROJECTOR (VU-MASTER)

Places an image on a screen by passing light through a transparent acetate which lies on the horizontal glass face ("stage") of the projector.

Advantages:

1) Presenter can face the audience.

2) Can work in an undarkened room

   - Therefore, can have 2-way communication, eye contact, and notetaking.

3) Transparencies are easy to make.

4) Projector is easy to use.

Advantages Continued:

5) Presenter can point out elements and/or draw directly on the transparencies while lecturing to the group.

For Colorful Visuals use:

1) Watersoluble pens.

2) Wax pencils (designed specifically for overheads)

3) Permanent felt-tip pens.

4) Adhesive-backed color film.

TAPE RECORDINGS

Advantages

1) Tape may be stopped to ask a question, emphasize a point, or replay a whole section.

2) Tapes can be circulated and used like films.

3) Tapes can be used to document the voices of key executives in an organization on goals, problems, or matters of information to employees.

4) Tool for collecting data, transcribing conference talks and discussions, and for recording training sessions for later editing and use.

5) Tape interviews with workers, managers, etc. for bringing firsthand information into a training session.

Advantages Continued:

6) Used for ready-made training courses; also used in language teaching, speech, and salesmanship.

7) Trainers can place examination questions on tape.

8) Can be used to synchronize with visuals (slides, etc.) as part of the presentation.

When using tape recordings (for training):

1) Establish a suitable listening environment.

2) Organize and produce suitable recordings.

3) Coordinate the necessary involvement and follow-up activities for the trainee.

4) Catalogue and store recordings for easy reference and further use.

5) Edit properly to fit special training needs.

Tape Recorder

1) Simple to operate for recording and playback

2) 3-3/4 inches/second (ips) or 7-1/4 ips speeds are most commonly used for training.

3) Open reel or cassette

Recording

Need good equipment, proper microphone placement, suitable room acoustics, and careful adjustment of recording levels for tone and volume.

SLIDES/FILMSTRIPS

1. A filmstrip consists of a series of pictures printed on a strip of 35mm film, already arranged in a fixed sequence. Slides are individually mounted but may be arranged in a "magazine".

2. Capitalizes on the elimination of irrelevant, distracting motion by showing only pertinent visual data on each phase of a subject.

Advantages:

1. Compact

2. Easty to handle and file and prepare

3. Simple to project - can be seen with ease and detail at 100 or more feet

4. Comparatively inexpensive to make, buy and use

5. Flexible for presentation

6. Valuable for prolonged study

Disadvantages:

1. Fixed sequence of pictures on filmstrip (but not on slides)

2. Difficult to single out one frame for projection (for filmstrip)

3. Room darkening requirements

SLIDES/FILMSTRIPS Continued:

Slides

1. Usually 2" size (also 2-1/4" and 4")

2. Can be readily produced at an amateur or professional level

3. In an illustrated lecture, slides permit the presenter to adapt his narration or discussion to fit the circumstances.

▷ Sound Slide Film

1. Has a synchronized recording on disk or tape

2. Produced with an audible signal for (manual) frame changes or with an inaudible (automatic) signal

Training task must have well-defined objectives, problems and questions for consideration, lead group into making valid generalizations, when using slidefilms.

Projection

2" slide projector is capable of holding 80 slides, changing and focusing remotely, and varying the image size.

▷ FILMS (MOTION PICTURES; MOVIES)

- Provide an effective means of communication with large, widely separated groups.

Advantages:

1. Can be used when, and as often, as needed

Advantages Continued:

2. Can present factual information
3. Can motivate learning
4. Can clarify a job skill
5. Can demonstrate action
6. Can dramatize an event
7. Can help form an attitude
8. Can summarize a situation

Films used in training programs can be:

Informational, instructional, documentary, fictional, technical/scientific, and animated.

3 Standard Film Widths:

35mm, 16mm, and 8mm

16mm is most widely used.

Film may also be:

- sound or silent
- color or black and white
- continuous loop (cartridge) or standard reel size

Procedure of Using Film

1. Preparation
   - Use the film where it fits best, logically or psychologically, in the training program.

Procedure of Using Film

- Always review the film.
- The training facility must be readied (including proper placement of the projection system, seating, lighting, and ventilation).
- Learners must know in advance why the film will be shown, what to look for in it, and how it relates to preceding and following facets of their training program.

2. Presentation

- Show film several times if necessary.
- Stop and discuss at appropriate point(s).
- Film clips
- Trainer may elect to narrate all or part of a film himself by turning off the sound.

3. Participation

- Group response as a discussion of key points or questions previously raised

▷ "Single Concept Film" ("Loops")

a. Using an 8mm cartridge loaded projector.

b. Trainee may replay over and over until the skill or concept is mastered.

Procedure of Using Film

4. Practice

   - Involves the application of the principles, information, ideas, actions, or processes brought out through film techniques

   - Follow-up for the film providing learner with the necessary clarification to his understanding or performance of a task

Criteria for Producing Films:

1. Is there no film already available to serve the need?

2. Does the training situation warrant use of a film?

3. Are there enough people in the program to justify the production costs?

4. Is there enough lead time available to produce the film?

▷ TELEVISION

Advantages

1. Can use authoritative instructors

2. Minimal loss of work time through on-the-job training

3. Saves the training department time in running training courses

4. Offers immediate introduction of new techniques and ideas

Advantages Continued:

5. Presents a wide variety of subjects into the classroom

6. Offers the classroom teacher an opportunity to observe other teachers in action

7. May be used for direct teaching by having the entire lesson plan or a partial lesson presented

▷ Closed Circuit Television

1. Signal is not picked-up by the general public.

2. May distribute signals throughout a school building, around a campus, or over a wider area

3. Inputs provided by studios, videotape recorders, off-air antennas, and film chains

4. System requires the addition of audio-to-video signals which are then fed into a transmitter or modulator which converts the signal to VHF.

5. Closed circuit does not require licenses, and can be operated in any fashion consistent with instructional objectives.

6. Production techniques are specialized.

▷ POLAROID CAMERA

Still or motion photographs, immediately available, can also be used by a student to present his/her impressions of the community. They tell their own story, or they may be used as the springboard for a written story the student might prepare to accompany them.

VIDEOTAPE CAMERAS (VTR)

Use -

Enables one to film various role playing and practice teaching sessions for immediate playback to the trainees for critique sessions. In workshops, people can discover both strengths and weaknesses of which they were previously unaware.

Advantages:

1. Suitable for demonstration classes
   - tape can be stopped while class discusses aspects of the teaching.
   - tape can be backed and replayed.
   - tape can be edited to contain those behaviors the instructor wants to discuss.
2. You can prepare your own demonstration film to suit your own curriculum.

Disadvantages:

1. Scheduling and coordinating
2. Breakdown of equipment
3. Hauling equipment around

Producing VTRs

1. Determine who the audience will be.
   - for topic, language; used for one audience or several

Producing VTRs

2. What format will be most effective in communicating the message?

3. Talent

   - Do a test tape of a potential participant.

4. Length of tape

   - 1/2 hour is a good time limit, but this will vary depending upon the speaker, topic, and audience.

   - "PORTAPAK" video recorder maximum length tape available is on 5" reels (30 minutes).

5. Check out equipment before the participants arrive.

   - Make sure graphics are properly prepared and placed.

6. Lighting

   - Prepare lighting before the participants arrive.

   - Participants must be lighted from the front so their features are clearly defined.

   - Some light from above and behind so they appear to stand out from the background

   - "KEY LIGHT" - general light so shadows are soft

Producing VTRs

- Encourage participants to wear dark clothing.

  (light colored clothes can intefere with the automatic lighting controls in the camera).

7. Operating

   - Use one or more outside microphones.

   - Change from a medium shot of a speaker to a tight close-up very slowly. Audience should not be aware that the point of view is changing.

Presentations on VTR

1. Appropriateness for audience
2. Understandable - one idea at a time
3. Arranged in proper order
4. Uncluttered
5. Use of visual aids, organized and correct size for video (4 x 3 aspect ratio; horizontal)

   - 3 units high by 4 units wide, with at least 2 units of bleed space on all sides, to allow for framing

Other Advantages of VTR:

1. Tape can be erased and reused.

Other Advantages of VTR*:

2. 1/2" tape is inexpensive in black-and-white.

3. Does not have to be sent away for developing and processing

4. Sound and picture run simultaneously, eliminating the problem of lip synchronization that film has.

5. Use of a zoom lens can produce already available printed material in the correct size for presentation (no costly enlargements).

6. Saves hours of repetitive work for trainers

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*Source: Grayson Mattingly and Welby Smith: Introducing The Single-Camera VTR System (Chas. Scribner's Sons, New York, 1973) is the best single source on operating and maintaining the VTR.

EVALUATIVE ACTIVITIES

INDIVIDUAL REPORTS

Trainee will present a report on one aspect of the workshop to present to the other trainees and to the trainer in the workshop.

QUESTIONNAIRES

Printed questions used in gathering information on a specific subject. Each question is brief, specific; phrased to get a short answer; designed to elicit information to be used to determine training needs, evaluate training workshops, identify course content, etc.

Developing a questionnaire to collect data on a certain subject can also be a learning experience, since it will require considerable research to know what questions to ask for complete coverage.

OPEN-BOOK EXAMS

An excellent study technique and an opportunity for the student to dig out materials in response to structured questions. (This technique places more emphasis on learning than it does on providing an accurate indication of what the trainee knows).

INSTRUMENTATION

Uses:

1. Providing instrumented feedback to group members

2. Manipulating group composition

Instrumentation *

3. Teaching theory of interpersonal functioning

4. Researching outcomes of training interventions

5. Studying here-and-now process in groups

TESTING

The term "tests" encompasses many different types, such as:

1. Paper-and-pencil, multiple-choice, objective test

2. Any measure of intellectual abilities

3. Mechanical, clerical, and other aptitudes

4. Dexterity and coordination tests

5. Knowledge and proficiency tests

6. Tests of "interests"

7. Specific personal history requirements

8. Scored interviews

9. Rating scales

10. Application forms

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*Source for different types of instruments; advantages and disadvantages of using instruments; and what to look for in an instrument is: Reference Guide to Handbook and Annuals, J. William Pfeiffer and John E. Jones (Calif: University Associates), 1975, pp. 67-78.

▷ Paper-and-Pencil Tests

1. Used for most general abilities and achievement tests.

2. Ease of administration to small or large numbers of people

3. Form supports objectivity and economy in scoring, reporting, and research evaluation.

4. Tests can range from:

   multiple choice or checklist form to unstructured measures such as open-ended essay type

5. Ratings, reference forms

▷ Performance Tests

1. Assess an employee as he/she uses tools, equipment, data, and other facilities in a realistic work setting.

▷ Simulation Modes

1. A situation is designed to replicate as closely as feasible important features of the "real" work site, and the person being tested is asked to perform a specific task in a specific way.

▷ Interactive Methods

1. Candidate gets continuing feedback that influences how he/she responds to the next phase of the test.

2. May use computer-based devices.

Interpreting Tests

1. Norm-Referenced type:

   a. The strength of the employee's score or performance is judged in relation to the range of scores made by some defined reference group.

2. Criterion-Referenced type:

   a. The employee's test behavior is related to specific pre-stated objectives which indicate what the trainee should learn.

3. Content-Referenced type:

   a. Useful in determining whether the employee has mastered a desirable level of competence in the subject matter or skills area being tested.

   b. Involves a detailed specification of what the employee is expected to know or be able to do in order for decisions to be made about his/her training, placement, or promotion.

Employee Characteristics Which Tests Are Designed to Assess:

1. General Intellectual Abilities

   a. Emphasize cognitive abilities - such as verbal comprehension, reasoning, and special orientation.

   b. These abilities contribute to successful learning and performance in many jobs.

2. Aptitudes

   a. The person's capacity to attain, from learning or training opportunities, new kinds or levels of knowledge, skills, abilities, or personal characteristics.

3. Achievement

   a. Measure what the employee knows, understands, or can do in relation to very specific areas of job knowledge or skill.

   b. The test can present an entire task; or it can sample from the domain of knowledge; or it can be an "in-basket" test which presents a typical array of administrative problems for consideration and action by the trainee.

4. Psychomotor and Sensorimotor Abilities

   a. Tests the employee's ability to do work involving predominantly muscular activities or sensory activities.

   b. Sensorimotor examples are: visual, auditory and tactile activity.

   c. Psychomotor examples are: dexterity, eye-hand coordination, and strength and agility.

5. Interests and Motivation

   a. This evaluation is best accomplished through expressed statements of employees and on review of their records rather than on formal test procedures.

6. Interpersonal Skills, Leadership Qualities, Etc.

   a. Situational tests or leaderless group discussions.

   b. Provides an observation of employees' skills in working with others and in handling and solving typical problems of the kind they could confront on a job.

7. Personal History Data

   a. Takes the form of a review of an application blank and other information in the personnel file - work experience, education, credentials, special awards, and relevant memberships and activities, etc.

▷ Oral Questioning

Trainer orally asks questions of the trainees to evaluate the extent of what they have learned in the training workshop.

▷ Critiques

Purpose is to improve trainee learning and to improve a test which has previously been administered.

- Trainer conducting the critique will have data describing the performance of the group on the total test and on each of its parts.

- During the test, the trainees have an opportunity to note items they wish to

Critiques Continued:

have discussed during the critique session, or the instruction which can be eliminated from future versions of the test.

Critique should be conducted as follows:

1. Instructor informs the group how well it performed on the test by identifying the range, mean, and median scores.

2. Each item that poses difficulty for the group, or about which more than 1 or 2 trainees had comments or questions, is discussed.

3. Problems with individual items pointed out during the critique that indicate a needed revision are noted.

4. The instructor makes changes in his/her approach and techniques. Remedial instruction is provided for the trainees who need it.

Videotape Playback-Critique

The idea is to play the videotape back and then to critique the performance recorded on the VTR.

Best used:

1. Persons learning specific motor skills
   - show tape playback on their performance.

Videotape Playback-Critique Continued

2. Some aspects of sales training
   - when physical demonstrations of certain equipment are required.

3. Practice teaching skills.

Role Plays

1. Trainer wants to demonstrate to the trainee certain behavior that the trainee has engaged in.

When videotape is used in conjunction with role playing, the following guidelines should be considered:

1. During the taping process itself, use only a fixed camera or cameras (2 or 3 cameras are preferable to one) - a roving camera can be very distracting and usually will inhibit the role players.

2. Play back the video tape of the role play in a private consultative situation and allow the role players to initiate the critiquing with the consultant.

3. You must get consent for taping from the individuals or group prior to the taping.

Multiple Group Presentations

The student body is divided into 3 (or multiples of 3) smaller groups, and each group develops the same topic in one of the following ways:

Multiple Group Presentations Continued

1. Visual (or graphic) presentation

2. Panel discussion or debate

3. Spontaneous role play or planned skit

Feedback Sessions

- Help to make trainees more aware of what they do and how they do it.

- Feedback increases the ability to modify and change behavior and to become more effective in interactions with others.

- Feedback must always be given in a loving, concerned, supportive atmosphere.

Factors for Effective Feedback: (both as the giver and the receiver)

1. Focus feedback on behavior rather than the person

   - on what a person does rather than on what we imagine he is.

   - use adverbs (which relate to actions) rather than adjectives (which relate to qualities).

2. Focus feedback on observations rather than inferences.

   - Inferences about a person contaminate our observations

Factors for Effective Feedback: Continued

3. Focus feedback on description rather than judgment

   - description represents a process for reporting what occurred

   - judgment refers to an evaluation in terms of good or bad, right or wrong

   - Descriptions are neutral; whereas, judgments arise out of a personal frame of reference.

4. Focus feedback on behavior related to a specific situation, preferably to the "here and now", rather than to behavior in the abstract, placing it in the "there and then".

5. Focus feedback on the sharing of ideas and information rather than on giving advice.

6. Focus feedback on exploration of alternatives rather than on answers or solutions.

7. Focus feedback on the amount of information that the person receiving it can use, rather than on the amount that you have which you might like to give.

8. Focus feedback on what is said rather than why it is said.

* * * *

END